

**OC HMIS User Meeting Webinar Minutes  
9/7/22**

**Contents**

<b>Agenda Items</b>	<b>1</b>
HIC PIT Focus Group	1
LSA and SPM Preparation	2
Managing Household Composition Changes in the CES	2
Duplicate Enrollments	2
Program Move vs Merge	2
Disabling Condition	3
Chronic Homelessness	3
Number of Times/Months Homeless	3
Adding Clients to the Community Queue	4
Maintaining Households on the Community Queue	4
2022 Agency Audit	4
Data & Performance Management Meeting Agenda	5
Individual Shelter Bed Reservation	5
Q&A	5
Future Meeting Information	6
October 2022 HMIS User Meeting Webinar	6

**Agenda Items**

***HIC PIT Focus Group***

211 OC would like to invite Agency Admins to join the HIC PIT Focus Group

- Receive feedback from previous HIC PIT reporting process and to develop a new process for this upcoming HIC PIT
- Please submit a HMIS Helpdesk ticket if you're interested in participating

## OC HMIS Monthly User Meeting Minutes

### ***LSA and SPM Preparation***

Longitudinal System Analysis (LSA) and System Performance Measure (SPM) will roll out in the Fall

- The HMIS team will send out the SPM corrections along with the quarterly Data Quality Report Cards draft spreadsheet
- LSA will be sent in rounds for corrections and explanations

### ***Managing Household Composition Changes in the CES***

A household experiencing homelessness is enrolled into the Coordinated Entry System (CES) to be linked to housing services. In very rare cases, a household may be served by both the Individual and Family Coordinated Entry System. This occurs when the household's composition has changed while the household is in the process of being served.

- A client becomes pregnant
- A single adult merges household with another adult with a child
- Or children are permanently removed from the household

Please review the Knowledge Base Article for details on how to manage the household's enrollment in HMIS when the household composition changes.

- [Managing Household Composition Changes in the CES](#)

### ***Duplicate Enrollments***

Duplicate enrollments occur when a client has simultaneous enrollments to the same project. This may occur after a client merge or due to a data entry error. To resolve:

- Determine the primary project enrollment to keep.
- Transfer services and notes from the duplicate enrollment to the primary project enrollment.
- Contact your Agency Administrator (AA) to delete the duplicate enrollment.

Review the [Deleting Program Enrollment KB](#) for more information.

### ***Program Move vs Merge***

A Program Move is used when a client is mistakenly enrolled in the wrong program.

Note: If the client was provided services with funds for that program, the client cannot be moved. They must be exited and enrolled in the new program.

- To resolve: Submit a ticket to the Helpdesk to request a program move.
- Review the [Deleting Program Enrollment KB](#) for more information.

A Program Merge is used to combine the program enrollments of household members who were enrolled as individuals by mistake instead of a group enrollment.

## OC HMIS Monthly User Meeting Minutes

- Enrollments can be merged even if the enrollments have different start dates.
- Enrollments can be merged if some or all of the household members are no longer enrolled in the program.
- To resolve: Submit a ticket to the Helpdesk to request a client merge into the group enrollment of a household.
- Review the [Merging Individual Enrollments into a Group KB](#) for more information.

### ***Disabling Condition***

HUD defines a disabling condition as a physical, mental, or emotional impairment, including an impairment caused by alcohol or drug abuse, post-traumatic stress disorder, or brain injury that:

1. Is expected to be long-continuing or of indefinite duration;
2. Substantially impedes the individual's ability to live independently; and
3. Could be improved by the provision of more suitable housing conditions

For further information, review the [Disabling Condition Field KB](#)

### ***Chronic Homelessness***

The Department of Housing and Urban Development's definition of a “chronically homeless” individual is defined to mean a homeless individual with a disability who lives either in a place not meant for human habitation, a safe haven, or in an emergency shelter, or in an institutional care facility if the individual has been living in the facility for fewer than 90 days and had been living in a place not meant for human habitation, a safe haven, or in an emergency shelter immediately before entering the institutional care facility.

- For additional information, review the [Chronic Homelessness KB](#).
- 211OC has created [an interactive tool](#) that will help you determine the Chronic Homelessness status of your clients.
- Elements used to determine CH Status: Approximate Date Homelessness Started, Prior Living Situation, Disabling Condition

### ***Number of Times/Months Homeless***

The Number of Times Homeless and the Number of Months Homeless are to be used with other information to identify whether a client appears to meet the criteria for chronic homelessness at various points of enrollment.

- For the Number of Times Homeless, you count all the different times the client has been on the streets, in emergency shelters, or in safe havens in the past three years, including today.
- For the Number of Months Homeless, you count the cumulative number of months in which a person experienced homelessness in the last 3 years.
- An in-depth explanation on how to calculate these two data elements can be found on the following knowledge based articles

## OC HMIS Monthly User Meeting Minutes

- [Number of Times Homeless](#)
- [Number of Months Homeless](#)

### ***Adding Clients to the Community Queue***

We wanted to provide a refresher on how to add clients to the Community Queue. We have updated the [Adding Households to the Community Queue](#) knowledge base article and uploaded a video that explains each step in the process. In order to add a client to the community queue you must perform the following steps:

- Enroll the household into the appropriate Coordinated Entry Project (ICES under County of Orange or FCES under Family Solutions Collaborative)
- Complete the appropriate CES assessment (Individual, Family, or Veteran)
- Upload documentation (literal homelessness verification is the minimum requirement)
- Complete the referral to the CQ

### ***Maintaining Households on the Community Queue***

We have updated the [Maintaining Households on the Community Queue \(CQ\)](#) knowledge base article and added a video guide. The article and video review the methods used to Maintain Households on the CQ including:

- "Check-In" on the Referral page
- Add a Note to the Head of Household's record
- Update the Current Living Situation
- Add a Coordinated Entry Event

### ***2022 Agency Audit***

The HMIS Help Desk will reach out to Agency Administrators at least two weeks before with available meeting dates and times providing a few options to schedule the audit so as to ensure ample time to prepare. Please be on the lookout for our email to schedule your Agency Audit. We will be attaching the Audit Form for your agency.

- You will need to review the attached files on the audit form. These reports contain information such as active users for your agency, active projects, current bed inventory, and users in your agency that are receiving correspondence from 211 OC.
- Please review the reports and complete the audit form questionnaire 2 business days before your scheduled audit meeting.
- The following forms must be dated in 2022 and signed (wet signature) by leadership at the agency: Participating Agency Agreement & the Inter-Agency Data Sharing Agreement

### ***Data & Performance Management Meeting Agenda***

The agenda for this month's meeting is as follows:

- Homelessness Prevention PPR
- CoC Racial Equity Dashboard

The meeting will take place on Thursday September 8th, 1:30 - 3:00 PM

## OC HMIS Monthly User Meeting Minutes

- Click [here](#) to Join!  
Meeting ID: 810 9405 7685  
Passcode: 625080

### ***Individual Shelter Bed Reservation***

The Office of Care Coordination timeline for the Individual Shelter Bed Reservation referrals have pushed back to approximately Mid October

- Jasmin from the Office of Care Coordination has a brief update regarding the Individual Shelter Bed Reservation
- For any additional questions on the Individual Bed Reservation System, please contact the Coordinated Entry inbox at [coordinatedentry@ochca.com](mailto:coordinatedentry@ochca.com)

### ***Q&A***

- Q: Program Move - Would like to clarify for a Program Move it would mean a client was accidentally enrolled in a program when they should have been enrolled in a different project?
  - A: Yes, that is correct. A Program Move would only occur when the initial enrollment was an error.
- Q: Program Move - Would an alternative to the note: If the client was provided services with funds for that program, the client cannot be moved, be deleting the services and be deleted from the program?

A: This note is clarifying that if a client is served within one program and needs to be transferred to another program to continue services, there needs to be two separate program enrollment to reflect that the client was served under two projects. A program move would only occur when the initial enrollment is an error.
- Q: Duplicate Enrollments - Is there a function to transfer over the services and notes or do we have to manually create those?

A: There isn't a function to transfer over services or notes. You will have to manually transfer the notes and services to the primary project enrollments. After that is done, you can delete the services and duplicate enrollment.
- Q: Program Move - If it's an accidental enrollment would we delete the enrollment and enter the client into the new program? Or did we need to keep the enrollment for a history record?

A: To clarify the Program Move is to decrease the data entry that needs to be done to fix the initial error of project enrollment. You can delete and enroll the client into the correct project. The Program Move is an option to move the client into the correct project.

## OC HMIS Monthly User Meeting Minutes

- Q: Program Merge - Is there a preferred process for coordinated entry programs? I know that when there are duplicate profiles merged or when two participants' enrollments are merged, there will be multiple referrals and we can't backdate those so is it better to leave them alone?
 

A: If a client has duplicate profiles or program enrollments we should be merging those to de-duplicate the records. If this results in duplicate referrals, we will need to delete the duplicate referral. Submit a ticket to the HMIS Helpdesk and let us know which referral needs to be deleted and we will process it. Users with Matchmaker access will be able to delete the duplicate referral as well.
- Q: Disabling Condition Field - When you select the substance abuse as a disabling condition, we are unable to just select yes but must select if it's specifically alcohol, drugs or both. Our partners are indicating that it's against HIPAA to be specific and would like the option to only enter in "yes".
 

A: These fields come from the HUD Data Dictionary so unfortunately this is the way we have to collect the disabling conditions. HUD is releasing new data standards and are accepting feedback, so if your team is interested in providing that feedback please submit a ticket: <https://www.hudexchange.info/program-support/my-question/>
- Q: Chronically Homelessness Tool - There's an option for prior residence for Safe Haven, I thought we didn't have any Safe Havens in Orange County.
 

A: Orange County does not have any Safe Havens. Part of the HUD guidance is that if a client is entering from a Safe Haven and is entering from another county, that it is possible that they're staying in a Safe Haven prior to entering OC.
- Q: Chronically Homelessness Forms - What documentation is needed for chronicity? I know we can submit declaration of homelessness, self-certification and 3rd party.
 

A: For CES, to be considered chronically homeless both a chronic homelessness verification and a disability verification needs to be uploaded. If you may have any additional questions, please direct your questions to the CES SPA Admins.

### ***Future Meeting Information***

#### ***October 2022 HMIS User Meeting Webinar***

- Date: Wednesday, October 5th, 2022
- Time: 10:00AM - 11:00 AM
- Click [here](#) to join the meeting! No registration or RSVP is required.
- All User Meeting webinar recordings and meeting minutes are available [on our website](#).
- Have an idea for a future agenda item? Submit a ticket via the [HMIS Help Desk](#) using the "HMIS – Users and Trainings" category with your ideas.